

STATE RETIREMENT AGENCY
120 EAST BALTIMORE STREET
BALTIMORE, MARYLAND 21202

APPLICATION FOR AN ESTIMATE OF
DISABILITY RETIREMENT ALLOWANCES

IMPORTANT: TO BE COMPLETED BY MEMBER: PRINT IN INK OR TYPE. IF YOU NEED ASSISTANCE IN COMPLETING THIS APPLICATION, TELEPHONE A RETIREMENT COUNSELOR AT 410-625-5555. IF LONG DISTANCE, CALL 1-800-492-5909.

FOR RETIREMENT USE ONLY

FORM 21A (REV. 12/08)

TO BE COMPLETED BY THE MEMBER. NOTE: AT ACTUAL RETIREMENT, IF YOUR EFFECTIVE DATE IS OTHER THAN THE FIRST OF A MONTH, YOUR MONTHLY RETIREMENT BENEFIT WILL NOT COMMENCE UNTIL THE FIRST OF THE MONTH FOLLOWING YOUR SELECTED RETIREMENT DATE. CHECKS ARE PAID AT THE END OF EACH MONTH FOR THE MONTH JUST ENDED.

TYPE OF DISABILITY: (PLEASE CHECK): () ORDINARY () ACCIDENTAL

SOCIAL SECURITY NUMBER

EFFECTIVE DATE OF RETIREMENT

DAYTIME TELEPHONE NUMBER

MO DAY YR

NAME

FIRST INITIAL LAST

MISCELLANEOUS

ADDRESS

NUMBER AND STREET

CITY AND STATE ZIP CODE

RETIREMENT ALLOWANCES: CHECK THE BLOCK TO INDICATE YOUR CHOICE(S).

- ☐ BASIC The Basic Allowance pays you the largest possible amount of money each month until your death. All monthly payments stop at your death. After your death, your beneficiary or estate will receive one payment if your death occurs on the 16th of the month or later.
- ☐ OPTION - 1 Provides a lower monthly benefit than the Basic Allowance, but guarantees monthly payments that equal the total of your retirement benefit's Present Value. The Present Value of your benefit is figured at the time of your retirement. If you die before receiving monthly payments that add up to the Present Value, the remaining payments will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.
- ☐ OPTION - 2 Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit will continue to be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.
- ☐ OPTION - 3 Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death one half of the monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

IF OPTION 2, 3, 5 or 6 IS REQUESTED INDICATE:

Relationship (check): Spouse _____ Disabled child _____ Other _____ Beneficiary's Date of Birth _____ Beneficiary's Gender _____
Beneficiary's Name _____

If you are electing Option 2 or Option 5, you cannot designate a beneficiary who is more than 10 years younger unless the beneficiary is your spouse or disabled child.

- ☐ OPTION - 4 Provides a lower monthly benefit than the Basic Allowance, but guarantees the return of your accumulated contributions and interest as established when you retire. If you die before you have recovered the full amount of your accumulated contributions and interest, the remainder will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.
- ☐ OPTION - 5 Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. It also provides that your monthly benefit will "pop-up" to the Basic Allowance for your lifetime if your beneficiary dies before you. If your original beneficiary dies and you are collecting the Basic Allowance and decide to name a new beneficiary, your benefit will be recalculated under Option 5 based on the new beneficiary designation. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.
- ☐ OPTION - 6 Provides a lower monthly benefit than the Basic Allowance, but guarantees that, after your death, one half of the monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. It also provides that your monthly benefit will "pop-up" to the Basic Allowance for your lifetime if your beneficiary dies before you. If your original beneficiary dies and you are collecting the Basic Allowance and decide to name a new beneficiary, your benefit will be recalculated under Option 6 based on the new beneficiary designation. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

Do you wish to purchase any previous service for which you are eligible? () YES () NO

If yes, obtain a request to purchase previous service from your retirement coordinator and attach a copy with this application.

Member's Signature

Date